



USDA TURKEY MARKET NEWS REPORT

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U.S. Department of Agriculture

Agricultural Marketing Service

Poultry Programs

Market News Branch

NATIONAL TURKEY MARKET AT-A-GLANCE

DOMESTIC MARKET HIGHLIGHTS

The undertone was mixed on frozen hens and consumer sized toms. Demand slow to moderate. Trading centered on a heavy volume of firm priced frozen value added hens and toms in the East for July-November shipments, balance light. Offerings were in a full range and held with varied degrees of confidence. Fresh white meat demand was light to fair with a mostly steady undertone noted. Fresh tom breast meat trading was fair, balance of parts and meat light.

EXPORT MARKET HIGHLIGHTS

Trading was heavy on frozen thigh meat, frozen mechanically separated turkey and firm priced fresh tom drums, balance light. Demand was fair to good on dark meat items into some export channels, sluggish into others depending on commodity and destination. Inquiry continued to be noted from Asia, Eastern Europe, Mexico and Russia.



WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 10, 2003**

CURRENT SHIPMENTS 2/

	OFFERS	SALES	WTD AVG	VOLUME (000)	FORWARD SHIPMENTS 6/ WTD AVG	VOLUME (000)	DEL. PER	OPEN COMMITMENTS 7/ VOLUME (000)	DEL. PER
8-16 LB HENS									
EASTERN REGION 3/	58-62	58	58.00	120	-	-	-	-	-
CENTRAL REGION 4/	54.5-61	54.5-59	56.75	40	64.00	160	OCT	-	-
WESTERN REGION 5/	59-61	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	58-59	58	58.00	80	-	-	-	-	-
CENTRAL REGION	54.5-59	54.5-59	56.75	40	-	-	-	-	-
WESTERN REGION	57-59	-	-	-	-	-	-	-	-

WHOLE YOUNG TURKEYS, FROZEN 1/, CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS) **JULY 11, 2003**

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8-16 LB HENS									
EASTERN REGION 3/	54.5-62	54.5-61.5	58.49	510	62.50 63.50 64.50 65.50	400 480 720 440	AUG SEP OCT NOV	- - - -	- - - -
CENTRAL REGION 4/	54.5-61	57	57.00	20	-	-	-	-	-
WESTERN REGION 5/	59-61	-	-	-	-	-	-	-	-
16-24 LB TOMS									
EASTERN REGION	54.5-61.5	54.5-61.5	57.11	350	62.50 63.50 64.50 65.50	240 320 480 280	AUG SEP OCT NOV	- - - -	- - - -
CENTRAL REGION	54.5-59	57	57.00	20	-	-	-	-	-
WESTERN REGION	57-59	-	-	-	-	-	-	-	-

1/ May include product stored at temperatures in range of 1 to 25 degrees F. 2/ Includes product priced for shipment within 14 days. 3/ Includes product with 3 percent broth basting. 4/ Includes product with 3-6 percent broth basting. 5/ Includes products with 6 percent broth basting. 6/ Includes product committed for pricing during the previous 24 hours but shipment in more than 14 days from date of commitment. 7/ Includes product committed during previous 24 hours at prices to be determined at later date.

WEIGHTED AVERAGE PRICES FOR WHOLE YOUNG TURKEYS, FROZEN CONSUMER SIZES, COMMODITY PACK OR EQUIVALENT, US GRADE A, CENTS PER LB, DELIVERED (MINIMUM 10,000 LB LOTS)

WEEK OF JULY 11, 2003

	CURRENT WEEK	LAST WEEK	SAME WEEK YEAR AGO
8-16 LB HENS			
EASTERN REGION	58.40	60.00 **	66.50 **
CENTRAL REGION	57.14	58.50 **	66.00
WESTERN REGION	60.00 **	60.00 **	66.50 **
16-24 LB TOMS			
EASTERN REGION	57.28	58.50 **	61.00 **
CENTRAL REGION	56.10	57.00 **	60.00
WESTERN REGION	58.00 **	58.00 **	61.00 **

**BASED ON OFFERS

**SOUTHERN CALIFORNIA (L.A. AREA) PROCESSED TURKEY,
DELIVERED TO RETAILERS**

	<u>RANGE</u>
FRESH TURKEYS Y HENS 8-16#	96
FRESH TURKEYS Y TOMS 14-24#	96
FROZEN TURKEYS Y HENS 8-16#	66
FROZEN TURKEYS Y TOMS 14-24#	63-65
FROZEN TURKEYS Y TOMS 24-28#	65-72

**SAN FRANCISCO PROCESSED TURKEY
DELIVERED TO RESTAURANTS AND INSTITUTIONS**

	<u>RANGE</u>
TURKEYS Y HENS	119-129
TURKEYS Y TOMS UNDER 22#	99-125
TURKEYS Y TOMS 22-24#	99-125
TURKEYS Y TOMS 24-26#	99-129
TURKEYS Y TOMS 26 LBS & OVER	99-129

**FRESH TURKEYS WITH TIMERS OR EQUIVALENT U.S. GRADE A,
DELIVERED FIRST RECEIVERS, EASTERN REGION
CENTS PER POUND, WEEK OF 14-JUL-2003**

	(8-16#)	(16-24#)	
	HENS	LBS TOMS	LBS
	<u>PRICE</u>	<u>(000)</u>	<u>PRICE</u> (000)
SALES (PROMOTIONS INCLUDED)	67.10	42 64.00	40
SALES (PROMOTIONS NOT INCLUDED)	67.10	42 64.00	40
SALES (PROMOTIONS ONLY)			
SALES (PRICE TO BE DETERMINED)			

**TURKEY MOVEMENT TREND (IN THOUSAND POUNDS)
SLAUGHTER-CERTIFIED RTC TURKEYS**

JUNE	470,235*
JULY 1-5, 2003	65,119*
To date 2003	2,777,077*
To date 2002	2,652,030*

*PRELIMINARY

NUMBER OF TURKEYS SLTRD IN FEDERALLY INSP PLANTSBY GEOGRAPHICAL AREAS W/E 05-Jul-2003
(PRELIMINARY) (RELEASED 12:00 NOON CENTRAL TIME)

		<u>YOUNG TURKEYS</u>		<u>TOTAL TURKEYS</u>	
		PCT	AVG	OLD	AVG
		CHG	LIVE	BANDED	LIVE
<u>-THOUSAND HEAD-</u>	<u>PW</u>		<u>WT</u>	<u>-THOUSAND HEAD-</u>	<u>WT</u>
N EAST	710	-27	21.56	(A)	711 21.56
SATL	578	-33	29.97	(A)	578 29.97
N CENT	1,852	-20	31.42	(A)	1,852 31.42
S CENT	434	-13	19.79	(A)	434 19.79
WEST	369	-21	24.65	(A)	369 24.65
U.S. TOTAL	3,943(B)	-23	27.52	1	3,944 27.52
TO-DATE					
2003	123,200(B)			381	123,581
TO-DATE					
2002	121,443(B)			209	121,652

(A) Not published to avoid disclosing individual operations.

(B) Number of young banded breeder turks included: this week 47,000; for the year 1,642,000; last year to date 1,261,000.

LIVE TURKEYS SLAUGHTERED

W/E 05-Jul-2003

	<u>YOUNG</u>		<u>YOUNG</u>	<u>OLD</u>	<u>TOTAL</u>
	<u>HENS</u>	<u>TOMS</u>	<u>BREEDERS</u>		
	<u>THOUSANDS</u>				
HEAD	1,639	2,256	47	2	3,944
AVG WT	16.06	35.91	24.01	44.56	27.52
LAST WEEK	2,086	2,981	51	9	5,127
SAME WK YR AGO	1,467	2,256	53	4	3,780
AVG WT	15.52	35.03	24.46	47.62	27.32
TO-DATE/2003	48,775	72,782	1,642	382	123,581
TO-DATE/2002	48,544	71,638	1,261	209	121,652

USDA, AMS, POULTRY PROGRAMS, POULTRY MARKET NEWS OFFICES

Washington, DC	Voice	(202)720-6911	Mike Sheats, Chief
	Fax	(202)720-2403	
Atlanta, GA	Voice	(404)562-5850	Johnny Freeman, Officer-in-Charge
	Fax	(404)562-5875	
	Recorded	(404)562-5856	
Jackson, MS	Voice	(601)965-4662	Gary Brown, Southern States Area Supervisor
	Fax	(601)965-4661	
Des Moines, IA	Voice	(515)284-4471	Mary L. Adkins, Officer-in-Charge
	Fax	(515)284-4468	
	Recorded	(515)284-4545	
Bell, CA	Voice	(323)269-4154	Jim Derby, Officer-in-Charge
	Fax	(323)269-5926	
	Recorded	(323)260-4676	

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 10 JULY 2003.

The undertone on tom breast meat and destrapped tenderloins from current production was mostly steady, steady to instances weak on the balance of white meat items. Demand was light to instances fair with some interest noted on various frozen white meat items with -60 days age. Offerings were mixed with some suppliers holding new frozen production with more confidence than older inventories. Domestic trading centered on light volumes of fresh tom breast meat and plant grade 4-8 lb. breasts. Some fresh tom wings traded at 22 and frozen +6 months age frozen destrapped tenderloins 86 cents delivered domestic. Export trading was active with trading centered on frozen mechanically separated turkey (MST), thigh meat and drums, balance light. For export: frozen MST +30 days age 13, fresh tom drums 25, scapula -4 months age 43, plant grade basted 8-10 lb. breasts 2003 production 75.50, frozen tom breast meat 106 cents delivered.

DOMESTIC TRADING	PRICE RANGE	L.S.T. CODE 1/	WTD AVG PRICE	VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	88.00	400
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	153.00	18
BREASTS, 4-8 LBS PLANT GRADE 2/	78.00		78.00	200
DRUMSTICKS, TOM	25.00		25.00	30
DRUMSTICKS, TOM—FRESH				
DRUMSTICKS, HEN		W	24.00	9
WINGS, FULL-CUT, TOM	18.50-21.00		18.67	86
WINGS, FULL-CUT, HEN		W	21.00	17
WINGS, V-TYPE, TOM		F	25.00	20
WINGS, V-TYPE, HEN		F	54.00	20
NECKS, TOM	19.00		19.00	3
NECKS, HEN		W	17.00	6
BREASTS, B/S, TOM 3/	108.00		108.00	40
BREASTS, B/S, TOM—FRESH 3/	116.00-118.00		116.33	240
THIGH MEAT		F	52.00	20
THIGH MEAT—FRESH	58.00		58.00	40
BREAST TRIM MEAT		W	62.00	134
SCAPULA MEAT		W	52.00	40
TENDERLOINS				
DESTRAPPED TENDERS	89.00		89.00	20
DESTRAPPED TENDERS—FRESH		W	111.20	200
WING MEAT WITH SKIN		W	38.00	20
MECHANICALLY SEPARATED 4/				
MECHANICALLY SEPARATED—FRESH 4/	16.00-18.00		16.67	60

EXPORT TRADING

DRUMSTICKS, TOMS	24.00-25.00		24.11	352
WINGS FULL-CUT - TOMS				
WINGS, V-TYPE, TOM	25.00		25.00	208
TAILS		W	19.50	40
MECHANICALLY SEPARATED 4/	18.00		18.00	832
THIGH MEAT - FROZEN	46.00-55.00		48.26	508

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.): M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.

NATIONAL YOUNG TURKEY PARTS AND BULK MEAT, FROZEN (UNLESS SPECIFIED), CENTS PER LB., DELIVERED FIRST RECEIVERS, PART AND FULL TRUCKLOTS AS OF 11 JULY 2003.

The undertone on fresh tom breast meat and fresh destrapped tenderloins was mostly steady, balance of fresh white meat was steady to barely steady. The frozen white meat undertone ranged from at least steady on frozen tom breast meat from new production to barely steady at best on older supplies. The undertone on frozen thigh meat and mechanically separated turkey (MST) ranged from steady to firm for Russia and mostly steady for other destinations. The undertone on fresh thigh meat and fresh MST was steady to instances fully steady for the light to fair demand. Offerings light to adequate. Domestic trading light. Fresh wing meat traded at 41 and fresh scapula at 51 cents delivered domestic. Export trading was heavy on frozen thigh meat, MST and fresh tom drums, balance slow. For export: livers 17, hearts 21, fresh tom drums 22 cents delivered.

DOMESTIC TRADING	PRICE RANGE	LST CDE	WTD AVG PRICE	VOLUME (000)	WEEKLY WTD AVG PRICE	WEEKLY VOLUME (000)
BREASTS, 4-8 LBS GRADE A 2/		W	88.00	400	88.00	400
BREASTS, 4-8 LBS GRADE A—FRESH 2/		W	153.00	18	153.00	18
BREASTS, 4-8 LBS PLANT GRADE 2/		R	78.00	200	78.67	600
DRUMSTICKS, TOM	24.00-26.00		24.52	142	24.60	172
DRUMSTICKS, TOM—FRESH	24.00-28.00		26.50	80	26.50	80
DRUMSTICKS, HEN		W	24.00	9	24.00	9
WINGS, FULL-CUT, TOM	21.00-22.00		21.23	52	19.87	181
WINGS, FULL-CUT, HEN		W	21.00	17	21.00	17
WINGS, V-TYPE, TOM		F	25.00	20		
WINGS, V-TYPE, HEN		F	54.00	20		
NECKS, TOM	18.00-23.00		18.96	208	18.88	297
NECKS, HEN		W	17.00	6	17.00	6
BREASTS, B/S, TOM 3/		R	108.00	40	108.50	80
BREASTS, B/S, TOM—FRESH 3/	114.00-118.00		117.00	400	117.88	1,103
THIGH MEAT	51.00-52.00		51.50	120	51.50	120
THIGH MEAT—FRESH	50.00-53.00		51.43	140	52.91	220
BREAST TRIM MEAT		W	62.00	134	62.00	134
SCAPULA MEAT	50.00		50.00	40	51.00	80
TENDERLOINS						
DESTRAPPED TENDERS		R	89.00	20	94.49	566
WING MEAT WITH SKIN		W	38.00	20	33.20	100
DESTRAPPED TENDERS—FRESH	111.00-112.00		111.29	28	111.33	268
MECHANICALLY SEPARATED 4/						
MECHANICALLY SEPARATED—FRESH 4/	15.00		15.00	80	17.25	480
EXPORT TRADING						
DRUMSTICKS, TOMS	26.00		26.00	40	25.02	864
WINGS FULL-CUT - TOMS						
WINGS, V-TYPE, TOM		R	25.00	208	24.33	312
TAILS	21.00		21.00	40	20.25	80
MECHANICALLY SEPARATED 4/	16.00-20.00		17.85	1,408	17.77	2,640
THIGH MEAT - FROZEN	46.50-65.00		52.80	1,156	50.65	2,160

1/ CODES FOR LAST SIGNIFICANT TRADE (L.S.T.):

M=MONDAY T=TUESDAY W=WEDNESDAY R=THURSDAY F=FRIDAY

2/ Breasts are bagged; rib, back, and wing meat included; and basted.

3/ Boneless and skinless without tenderloins.

4/ 15-20% fat with skin added.